



Smart Libraries Newsletter
American Library Association
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July 2008 Evergreen Expands Into Academia

Smart Libraries Newsletter

Smart Libraries Newsletter delivers hard data and innovative insights about the world of library technology, every month.

Editor

Dan Freeman
312-280-5413
dfreeman@ala.org

Contributing Editors

Tom Peters
816-616-6746
tpeters@tapinformation.com

Marshall Breeding
615-343-6094
marshall@breeding.com

Administrative Assistant

Judy Foley
800-545-2433, ext. 4272
312-280-4272
jfoley@ala.org

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Smart Libraries™

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July 2008 Volume XXVIII Number 7

Evergreen Expands Into Academia

Open source library automation systems continue to make inroads into an increasing range of library types and sizes. Before the last two or three years, the adoption of open source library automation systems was relatively rare. In recent times, a larger number of public libraries have chosen to adopt open source library automation, usually with paid services from a commercial company. Koha, with the support of LibLime, and Evergreen, with support from Equinox, have found a growing following of public libraries in the United States. Until recent months, we have not seen academic libraries make formal commitments to open source automation systems. We reported in the February 2008 issue of *Smart Libraries Newsletter* that the WALDO consortium of academic libraries will be moving to a hosted Koha system.

First Academic Library Implements Evergreen

The Robertson Library of the University of Prince Edward Island became the first academic library to move to the open source Evergreen library automation system. The library went live on Evergreen on June 4, 2008, only about a month after the library's decision to migrate from its existing SirsiDynix Unicorn system.

Under normal circumstances, the implementation of a new automation system by a relatively small academic library wouldn't necessarily be a significant news event. But as the first academic library to venture to adopt Evergreen and to do so in a four-week sprint, it warrants some attention. We also take this opportunity to review some of the recent developments regarding Evergreen and Equinox Software.

Prior to its implementation by the Robertson Library, Evergreen has not seen production use outside of the public library sphere. The software was created for a consortium of public libraries, with specific attention to their automation requirements. The software lacks functionality required by most academic libraries, such as modules for acquisitions, serials control, and course reserves.

Not only did the library make a bold move as the first academic library to implement Evergreen, it opted for a frantic migration process that led the library to production use of the system only four weeks after the initial decision.

It should also be noted that this migration did not arise out of the need to move away from a legacy system that no longer was receiving support or development. The Robertson library was previously using Unicorn, the flagship system of the largest company in the industry.

Robertson Library, which opened in 1975, serves the University of Prince Edward Island with a print collection of about 300,000 volumes. The University was formed in 1969 through the merger of Prince of Wales College and St. Dunstan's University. Mark Leggott has served as University Librarian since October

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2006. Mark has been a long-time advocate of open source software.

Leggott indicates that the implementation of Evergreen falls within the library's overall technology strategy. "I like the collaborative nature of open source community and we are moving all our systems to open source software." An earlier project included the development of a Virtual Research Environment based on open source components including Drupal and Fedora.

The Robertson Library brought many resources to bear to make this compressed timeline possible. The library relied on a number of persons—both within the library and from external organizations—to complete the migration to Evergreen. The project provided the opportunity for widespread involvement by staff throughout the library. The library's internal efforts were led by its systems manager Grant Johnson. Staff members from throughout the library contributed to the project, meeting almost daily during the last phases of the project. The blog documenting the process describes the many tasks taken on by library staff members, involving testing the system and finding ways to accommodate the many differences between the way that Evergreen functions relative to their existing Unicorn ILS.

Equinox Software Provides Evergreen Services

The library contracted with Equinox Software for assistance in the migration process. Equinox Software is a small company devoted to promoting Evergreen and contracting with libraries to provide services surrounding the product. The company traces its roots to the individuals involved in the original development of Evergreen for the Georgia Public Library Service (GPLS), and is steadily adding new personnel. The company provides support to GPLS for its implementation of Evergreen as an external contractor and has adopted a

business model based on contracts with other libraries for services related to its support and development.

Equinox has recently recruited other industry experts to its ranks. Karen Schneider joined the company in May 2008 as its Community Librarian. Schneider comes to Equinox from the College Center for Library Automation in Florida where she was involved in research and development. She is a prolific writer in the library profession and beyond. Equinox appointed Dr. Robert Molyneux as Vice President for Business Development in November 2007. Molyneux formerly served as chief statistician for SirsiDynix with involvement in the Normative Data Project for Libraries. Shae Tetterton, also a SirsiDynix alumna, was hired by Equinox as a project manager in June 2008, working most recently for the South Carolina State Library.

Neighborly Assistance

The Robertson Library also drew upon the expertise of Dan Scott of Laurentian University, who has a history of involvement with Evergreen. Scott is involved with Project Conifer, working toward a shared version of Evergreen for several academic libraries in Canada including Laurentian University, McMaster University, and the University of Windsor. These universities plan to switch to Evergreen by May 2009. The smaller-scale implementation of Evergreen for the Robertson Library may provide valuable experience and insights concerning how the software functions in an academic library setting.

A Growing Community

The fold of libraries running Evergreen continues to expand. PINES, the original consortium to implement Evergreen, went live on September 5, 2006 for all 252 libraries. The PINES consortium has since expanded to 275 libraries spanning 140 counties in Georgia.

Kent County Public Library System, a small rural library in Maryland, also recently went live on Evergreen. This library worked with both Equinox Software and Alpha-G Consulting. Alpha-G Consulting specializes in helping libraries that use the Horizon library automation system.

In April 2008 The Michigan Library Consortium signed a contract with Equinox to migrate to Evergreen. A small group of libraries within the consortium will transition to Evergreen over the summer of 2008 with additional libraries to follow.

Evergreen has found a receptive audience in Canada. In addition to the Conifer Project mentioned above, the SITKA consortium in British Columbia has launched a shared instance of Evergreen available to libraries throughout the province, with about 15 libraries live on the system to date.

Implementation Challenges

The Robertson Library does not expect to move to an open source automation system without ongoing costs. Rather, it expects to make investments in the development of Evergreen to help fill in areas of missing functionality. Leggott explains, "We wanted to reinvest what the library pays annually to our current

The smaller-scale implementation of Evergreen for the Robertson Library may provide valuable experience and insights concerning how the software functions in an academic library setting.

vendor to the open source community by spending it on improvements to the Evergreen code.”

Some of the challenges that the Robertson Library faces in its implementation of Evergreen involve finding ways to fulfill functionality not currently present in the software. Evergreen was developed primarily for public libraries and lacks modules for acquisitions, serials control, and academic reserves—generally required for an automation system in an academic library setting. For each of these areas the library had to find other ways to automate this aspect of its operations. For acquisitions, the library moved this function from Unicorn to the library’s local financial systems and into spreadsheets. Some aspects of acquisitions and serials control were moved onto the open source CUFTS link resolver system, resulting in some electronic resource management features not present in Unicorn. CUFTS was developed at Simon Fraser University for the Council of Prairie and Pacific Libraries. The library is working toward other alternatives for course reserves as well. Electronic reserves will be handled by a custom system created with Drupal

and Fedora. They will use Evergreen’s bookbag feature to handle print items placed on reserve.

Evergreen also lacks a Z39.50 server. The library is currently exploring options to gain this functionality.

Leggott sees the move to Evergreen as a strong opportunity for the library, despite any functionality that had to be creatively implemented. “We are getting a lot of additional functionality and opportunity, such as a more open and flexible data model for doing whatever we want with our data.”

Ready for Prime Time?

The use of Evergreen by the PINES consortium in Georgia demonstrates that the software can successfully provide automation for public libraries. Its expansion to the SITKA consortium and other public libraries leverages the functionality already present in the software. Introducing the software into an academic library environment presents much more of a challenge.

The unfolding story of the adoption of Evergreen by the Robertson Library

demonstrates that the software does not come ready-built for academic library use, but is adaptable in the hands of creative and technically proficient personnel. Should we consider the implementation of Evergreen by the Robertson Library as evidence that Evergreen needs a lot of workarounds to function in an academic library? Or do we consider it as a versatile system capable of working with other open source applications as part of a broader automation environment?

As other academic libraries consider Evergreen among their options, they can learn from the experiences of the early adopters such as the Robertson Library to help judge the ability of the software to meet their requirements.

—Marshall Breeding

More Info. @:

Evergreen: <http://open-ils.org/>

Equinox: <http://eslibrary.com>

Alpha-G Consulting:
<http://www.alphagconsulting.com>

Dream Data: OCLC and Google Exchange Data

In late May OCLC and Google announced that they had signed an agreement to exchange metadata in order to improve the discoverability of library books through the various Google search services. With this agreement, libraries who are OCLC member libraries and who are participating in the Google Book Search Program may share their OCLC WorldCat-derived MARC records with Google.

In response to the announcement, Peter McCracken wrote a blog post that interprets the agreement as a win for Google (in the sense that more people will spend more time using Google’s content

and services), while it is a lukewarm win at best for Google Book Search Library Partners, with little or no benefit for the remaining libraries and library users.

It is difficult to predict the long-term impact of the activities and sharing of metadata that will result from this agreement, in part because users of Google and libraries will do what they want, regardless of the best laid plans of Google and OCLC. At the very least, however, Google seems to be seeing increasing value in the metadata created by libraries, and Google and OCLC seem to be becoming quite chummy.

—Tom Peters

More Info. @:

OCLC Press Release:
<http://www.oclc.org/news/releases/200811.htm>

Google Book Search:
<http://books.google.com>

List of Google Book Search Library Partners:
<http://books.google.com/googlebooks/partners.html>

RE: Reframe

An argument could be made that films (motion pictures, videos, movies, music videos, home videos, news footage, etc.), with their various genres (training films, feature length wide release commercial films, documentaries, short films, etc.) are one of the key content forms for understanding world culture in the 20th and 21st centuries. They may have overtaken other forms of expression, such as poetry and drama, as weighty cultural utterances, if such utterances could be weighed. If libraries plan to continue taking their role as archives of the public cultural record seriously, they need to take films seriously.

This challenge received a boost in June when the Tribeca Film Institute, a non-profit organization, with support from the John D. and Catherine T. MacArthur Foundation, launched Reframe, a project to make thousands of documentaries, independent films, educational films, and other video content beyond the pale of mainstream commercial films much more accessible in digital formats to scholars, educators, libraries, and the general public. The goals of the Reframe project are to make it easier and less expensive to convert “niche” films to current digital formats, and to make these films easier to find and access by scholars, teachers, students, and film buffs. Reframe may fill the gap between the small but tightly guarded corral of feature length commercial films and the wide and wild array of video content available on sites like YouTube. As the press release notes, “Reframe will be a trusted source to help guide quality content.” Trust and quality are the key words here.

The films will be made available to individuals and institutions on DVDs through Amazon.com, or via downloadable digital video to own or rent through Amazon’s Unbox service, assum-

ing the rights holders for a specific film have granted Reframe these distribution rights. To use the Unbox service, libraries will need to download and install the Amazon Unbox Video Player software, which currently runs only on computers running the Microsoft Windows operating system. Amazon Unbox is designed primarily for individual end-users, but it may be possible to set up an institutional account. The Unbox service is limited to single computers, too. Tammie Rosen from Tribeca suggested that it is both possible and permissible, for example, for a college library to have an institutional Unbox account, then work with individual professors at that college who want to integrate Reframe videos into the course content, then ask students to come to the library to view the videos at the designated library workstation. Reframe and Tribeca are mindful of library rights and responsibilities. The website FAQ page about licensing frequently cites various ALA documents.

Tammie Rosen from Tribeca reported to me that pricing for libraries probably will be based on the projected number of people who will view each film, the projected number of showings, and the method of delivery (i.e., on DVD or via a digital download). Ultimately, the rights holders will have some input into how the films they own are priced and distributed. Rosen reports that one piece of doing business with institutions such as libraries that is not yet in place is the ability to accept and handle purchase orders, but they are working on that.

The size of the collection at launch was slightly more than 200 films, but Tribeca hopes to reach the 10,000 title benchmark by the end of the first year of operation, including independent feature films, documentaries, short films, foreign films, and even classic public televi-

sion films and videos. In comparison, the master collection of downloadable videos from OverDrive already exceeds 6,000 titles. Version 3 of the OverDrive Media Console, the software that enables playback of video, audiobooks, and music from OverDrive, recently was released. Although Reframe currently has a much smaller master collection, they launched offering a DVD option. Their website quotes the ALA Factsheet on Videos and Copyright which states that libraries can loan and/or rent videos designated for home viewing only to patrons for their personal use. Downloadable digital videos from OverDrive currently cannot be burned to DVD. Steve Potash, the CEO of OverDrive, applauded Reframe’s entry into this market. The market for downloadable digital videos through libraries and library consortia is a small but growing segment of institutional content distribution, with a bright future in part because it avoids many of the costs and frailties of a hard-copy distribution system, such as DVDs, which are scratch magnets.

Reframe is not only aspiring to be a one-stop resource for films. They also are helping filmmakers and media artists to convert older films to digital format, when the costs of doing so unilaterally are prohibitive. The press release announcing the launch of Reframe notes that works in video formats will be digitized free of charge, and works in film formats will be digitized at cost. Reframe promises to return a digital copy of the converted film to the rights holder for free, and Reframe will allow the rights holders to make their content available to others in a nonexclusive arrangement. For this type of content, getting noticed, cited, and discussed may be much more important than protecting the distribution and copy rights. Reframe is

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Virtual World Metrics

Of the gathering and analyzing of statistics there is no end. We librarians have the gathering of statistics about bricks and mortar libraries down to a fine artful science, although there remains a troubling broadness and indeterminateness of the meaning of usage of information objects and services. When can we say with confidence and clarity that a user actually used an information object? Usage is a broad concept and very difficult to measure and confirm, especially in the context of legitimate user concerns about protecting their privacy and confidentiality. Often what gets counted as a use is only a strong indicator of use. For example, the user checked out the book, so we can assume that some sort of use probably occurred, even if the book was used during the circulation period only as a paperweight or a door jamb.

Metrics is the science of gathering and analyzing data. Although the validity and usefulness of a set of metrics developed for one discipline and environment are notoriously difficult to port over to another discipline and environment, the metrics of bricks and mortar libraries, of web-based library resources, and of the nascent virtual world libraries have some similarities. Take the basic concept of a “visit” to a library. In the real world, the gate count gives a sense of how many people passed through the entryways and thus visited the real library. On the web, through the use of web server log analysis software, it is possible to get a reliable sense of how many people visited your library’s website in a given period of time.

For libraries and other organizations creating presences in virtual worlds, a nifty tool called a proximity sensor has been developed. A proximity sensor basically senses when an avatar is within a specified range of the sensor, usually expressed as the distance of the radius

of a circle or sphere around the sensor. For example, if the sensor is set to detect activity within 20 meters radius of itself, and if an avatar comes within 5 meters of the sensor and stays “within range” for 5 minutes, the proximity sensor will log that activity as a visit.

Proximity sensors can be hidden from view, so that unobtrusive observation of activity can be detected. This is similar to the transaction logging feature of many online catalog systems, which record patron searches and system responses unobtrusively.

The unobtrusiveness of proximity sensor functionality is the tip of the iceberg of a host of interesting issues about privacy and confidentiality in virtual worlds. Some proximity sensors record and report only aggregate visit statistics. For example, they may report that in June 2008 a total of 75 unique avatars came within range of the sensor and spent a total of 300 minutes within range, for an average visit length of 4 minutes. Other proximity sensor products will record the actual name of the avatar who came within range of the sensor. The level of openness (transparency) or privacy between an avatar and the person behind the avatar varies from situation to situation and from person to person. Some people strongly identify their real selves with their virtual world avatars, while others don’t want people to be able to make that connection. If a proximity sensor product records the avatar’s name, does that represent a clear and present danger for an invasion of the privacy of the person behind the avatar?

Some proximity sensors can be deployed and harvested only by either the owner or officer of the parcel of virtual land upon which the proximity sensor is deployed. Other proximity sensor products can be deployed by anyone just about anywhere. If you are the director

of a library in a virtual world, would you want any Tom, Dick, or Jane avatar to have the power to unobtrusively deploy proximity sensors in your library and gather information about the number (and names) of avatars who visit your virtual world library?

One great thing about proximity sensors is that they are priced to sell. Some sensor kits, such as the ones from Maya Realities, are free, while others, such as the Remote Virtual Sensor from Thomas Conover Products, which work in the virtual world called Second Life, cost as little as \$2. The cost of staff time to investigate sensors, learn how to deploy and harvest the sensors for maximum usability and usefulness for your library, and actually collect the data on a regular basis probably will be the major expense of a proximity sensor project.

Virtual world metrics seems to be about at the stage of development and refinement that web-based metrics were approximately ten years ago, when organizations were just beginning to mine web server logs in earnest, and when lots of software companies were making web server log analysis software. Much of the development and use of proximity sensors is being done outside and beyond librarianship. When it comes to virtual world metrics, the values and needs of other organizations, professional groups, and commercial interests may not jibe with the values and needs of librarianship. We need to be actively engaged in the testing and use of virtual world metrics tools so that the norms and best practices that eventually will emerge reflect our professional input.

—Tom Peters

More Info. @:

Maya Realities Website:
<http://www.mayarealities.com/>

Microsoft Pulls the Plug on Live Search Books

The postmortem on Microsoft's Live Book Search continues in the wake of the late May blog post announcement from Microsoft that it no longer plans to offer separate portals for Live Search Books and Live Search Academic. If it hasn't been done already, someone should write a long blog post about the current propensity of major corporations to use blog posts to announce unfortunate news. The announcement also indicated that Microsoft would be "winding down" their digitization initiatives that they have undertaken with various partner organizations. The content that already has been digitized – approximately 750,000 volumes, according to the announcement -- will be ported over to the main Live Search engine.

When trying to read between the lines of the announcement and translate press-speak into plain English, I sense that Microsoft concluded that there is no viable business model to continue these particular mass digitization projects. This should come as no surprise to most scholarly and academic publishers. This market is all about the long tail. The longer the tail of niche content, the better. There are few high-volume sales items in the academic and scholarly content market.

Microsoft seems to be throwing the mass digitization project back to the libraries, archives, publishers, and repositories. Some librarians may see this as a return to the proper ordering of the scholarly communication universe, where the handling, scanning, storing, and delivery of scholarly content is seen as a public good activity best left to libraries and other not-for-profits. Other librarians, perhaps especially those who had formal working agreements with Microsoft on mass digitization projects, may miss the resources (financial, technical) that Microsoft brought to the table. In closing down this service, Microsoft agreed to remove any contractual restrictions they held on the public domain books that had been scanned, and they are allowing the partner organizations to keep the scanning and production equipment.

The skeptics who took a dim view of all these mass digitization projects when they were announced a few years ago may be chortling now, reminding folks that the differences between the breathless and grandiose announcements made at the beginning of a massive project and the end results can be substantial.

Some bloggers and commentators have seen this decision by Microsoft as essentially throwing in the towel to

Google. They suggest that, rather than fight Google on all fronts, Microsoft should pick its fields of battle carefully.

The impact of this decision on individual end-users is difficult to measure. One commentator (May 29, at 4:19 PM) to the blog post noted that this was a very bad development for researchers in third world countries.

It is difficult to predict what impact this hasty exit by Microsoft will have on the overall cluster of mass digitization projects. Brewster Kahle from the Internet Archive and the Open Content Alliance, which had been receiving financial support from Microsoft, was sanguine about Microsoft's decision, suggesting that the emerging new world order for mass digitization projects is the way it always should have been. He concludes his blog post with a rallying cry, "Onward to a completely public library system!"

—Tom Peters

More Info. @:

Microsoft blog post:
<http://blogs.msdn.com/livesearch/archive/2008/05/23/book-search-winding-down.aspx>

Brewster Kahle's blog post:
<http://www.archive.org/iathreads/post-view.php?id=194217>

Re: Reframe (continued from page 4)

working with CreateSpace, which has developed a DVD on Demand system. CreateSpace is a service of On-Demand Publishing, founded in 2002 as CustomFlix Labs, and, since 2005, a subsidiary of Amazon.com.

Additional support for Reframe comes from the Andy Warhol Foundation for the Visual Arts, the National Endowment for the Arts, and the New York State Council on the Arts.

—Tom Peters

More Info. @:

Reframe Website:
<http://reframecollection.com/>

Reframe Licensing FAQ:
<http://reframecollection.com/licensing.jsp>

Amazon Unbox:
<http://www.amazon.com/unbox/>

OverDrive Launches DRM-Free MP3 Audio Book Service

In late June OverDrive officially launched its new DRM-free MP3 downloadable digital audio book service for libraries and other institutional customers, which will complement, not replace, OverDrive's audio book service delivering protected WMA (Windows Media Audio) files. Both services can be integrated into one service, and version 3 of the OverDrive Media Console software will play both types, as well as the music and video content available through OverDrive.

In addition to circumventing the troublesome and troubling digital right management layer, the new service also makes it feasible for Mac, iPod, and iPhone users to access this content. Until now, many librarians have expressed concerns about providing a downloadable digital audio book service from OverDrive, NetLibrary, or another vendor that would not work on iPods, the most popular portable MP3 player.

At launch OverDrive's MP3 audio book collection contained approximately 3,000 titles, compared to approximately 20,000 titles in OverDrive's collection of protected WMA audio books, and approximately 80,000 electronic books. Understandably, the launch collection contains some classics in the public domain, but it also includes recently published popular works, such as *Catch Me if You Can* by Frank W. Abagnale, *Master and Commander* by Patrick O'Brian, *Sideways* by Rex Pickett, *Lost Boys* by Orson Scott Card, and *Breach of Duty* by J.A. Jance.

Claudia Weissman, the international business director at OverDrive, reported to me that the prices for the DRM-free MP3 versions of these audio books are the same or almost the same as the protected WMA versions. Whereas some vendors of downloadable digital music have elected (or been forced) to add a

price surcharge for the unprotected MP3 versions of their content, OverDrive is trying to offer the same pricing scheme. For the audio books currently available through OverDrive in the protected WMA file format, the average price per copy is approximately \$40.

The DRM may be gone from these MP3 audio books, but that does not mean that certain terms and conditions of use do not apply. Quoting from the press release, "Library users are required to acknowledge and agree to specific terms of use to the borrowed MP3 files before they can download from their library's "Virtual Branch" website. After the lending period expires, the OverDrive Media Console software disables access to the expired title. OverDrive Media Console then prompts the user to delete all OverDrive MP3 Audiobook files from their PC and any and all transferred copies."

The DC Public Library is the first library in the U.S. to offer this new service to the public. By the end of 2008 OverDrive plans to have hundreds of libraries and library systems offering MP3 audio books, including the New York Public Library, the Cleveland Public Library, and the King County Library System in Washington.

While the launch of this MP3 - based downloadable digital audio book service for libraries and other institutional customers certainly is a good thing overall, it is not all cakes and ale. Because MP3 files tend to be larger

than WMA files, the download times for these audio books will be longer. OverDrive has divided the MP3 audio books in parts, each lasting approximately one hour, as they have done with their protected WMA collection, but the download times, especially for dial-up users, may be noticeably longer for these MP3 files.

Preliminary tests of the transfer times from a Mac to an iPod also indicate longer transfer times for people who want to listen to these MP3 audio books on their iPods. Weissman speculates that the Apple designers of the iPod may not have paid much attention to minimizing content transfer times, assuming that users would be transferring short songs, not large audio book files. The launch of this service is just one more reason for the designers and manufacturers of portable audio playback devices to wake up and smell the audio books.

—Tom Peters

More Info. @:

OverDrive Press Release:

<http://www.overdrive.com/aboutus/getArticle.aspx?newsArticleID=20080625>

